



ROCKY MOUNTAIN INTERNATIONAL EXECUTIVE SUMMARY

OCTOBER 24-28, 2010

**UK MISSION
MANCHESTER AREA, ENGLAND**

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UK Mission Executive Summary:

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Participants:

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The 2010 UK Mission is the second UK mission this year and the first in the northern part of England. At this year's Summit Meeting, the RMI states decided to reduce their presence at World Travel Market again this year and focus instead on a mission in the northern UK market. This mission consisted of three full days of appointments with tour operators.

During the mission, the states had eight appointments and met with four tour operator companies (five appointments were with North America Travel Service branches) located in Manchester, Leeds, Nottingham and surrounding areas. Many meetings took place in the actual storefronts where the public walks in to ask questions and get information. All involved trainings on our region and a total of 32 people were trained. The states provided an overview of the region for sales staff, educating them on the region in general and assisted with specific questions. Eight leads were generated and packets of state travel guides, maps and regional information were distributed to each office. These meetings consisted of trainings primarily, with a small amount of product development.

Two tour operator dinners were scheduled on two evenings during the mission but were cancelled. Both were to have been smaller dinners, with fewer attendees than the London dinner on the last mission, due to the fact that tour operators in this area are spread apart over a larger area. Both dinners were less of an "event" than the London dinner when operators really made an effort to attend that dinner in a well-known London restaurant that they knew or had already heard about.

Fortunately the sales staff we trained seemed to appreciate the states' efforts of traveling to see them and many were surprised that this mission covered only the northern part of England and not London as well. They seemed genuinely pleased the states made such an effort to visit this area and, since most had never visited the Real America themselves, were eager to learn more about our region and to send clients our way. They were very interested in expanding their knowledge of destinations other than the typical Florida, California and New York requests they are accustomed to dealing with.

As an aside, we were happy to see our Real America Guide in several shop windows as well as posters of our states displayed prominently in some store displays.

Notable Trade Developments:

Complete North America – Before training their sales staff, we met with Roger Thompson, Duncan Harwood and Nicola Harwood, who recently took over production. They do a lot of tours in Canada and hope to expand a Calgary tour into Montana and to include Yellowstone as well. We discussed a possible fam tour for next summer into our region. Nicola would be an excellent candidate for Roundup 2011 or Megafam, if their fam tour does not work out.

North American Highways – We met with Heather Jeffs and Kerry Crowley, who have taken over production since the recent and unexpected departure of David Kettell's replacement. Kettell died earlier this year. They produced a small four-page guide to our region in 2007 and are interested in doing something similar again. Martin will follow up with them at World Travel Market about possible joint press trips to our region. The states also did staff training.

Ranch Rider / Independent Traveller - We met with both Malcolm and Tony. Malcolm briefed us on his company, the Independent Traveller, and tours from their main gateways, Denver and Calgary. Ranch Rider's new brochure (released Dec 2009) features 23 ranches in our four states. The states trained five staff including Vicky, who attended Megafam 2009, and Matt who was on the most recent Megafam.

Trends in the UK Market:

The UK remains the number one overseas market in visitation numbers to the US with over 3.8 million Brits visiting in 2009. It has been strongly affected by the recession over the past year and visitation numbers declined by 15% in 2009. Early 2010 figures show UK visitation for the first seven months of this year to be down 3% compared to last year. But there is still good reason to invest in this market and to be optimistic about the future.

The UK is slowly climbing out of the recession and there is general agreement that the worst is over. Economic growth in 2010 is slightly higher than last year and it is expected to be a slow recovery. However, there is a new hurdle to be overcome as the country prepares for massive cuts across the board in government expenditures. The main focus of the UK's new coalition government since it was elected in May is to reduce the national debt by making drastic cuts in spending, which will have a huge impact on Brits and their ability to spend money on travel. Many Brits vacationed at home in 2009 and may choose to do so again this year.



RMI's TRIP Reports show a modest 3% increase in available overnights in our region this year. Several important tour operators that RMI has worked closely with increased their overnights in our states. Many tour operators have reported increased interest in our region over the past year. Our region is a popular destination because of the British traveler's interest in eco-friendly and nontraditional experiences. Although many of the traditional US destinations were down, our region remains popular with the Brits, and is still a better value for them than Eurozone destinations. UK tour operators continue to be optimistic about the eventual recovery of the economy and travel industry, although it may be a long and slow process.

Evaluation of UK Mission 2010:

The states decided to focus on a UK Mission again this fiscal year and reduce their presence at World Travel Market. It was decided to focus on the north of England, as this is an area often neglected and there are many tour operators located here who are important to our region. All meetings included trainings and a total of 32 people were trained. Everyone we met with seemed genuinely pleased that the states made the effort to visit their area and were very interested to learn more about our region. This mission was a success in regards to reaching front line sales staff for trainings of our region.

Because the states have not attended WTM in two years, they should seriously consider attending with full participation in 2011, but we will be able to better evaluate this once Martin reports after this month's show. Attending both WTM and doing a UK mission in the London area in the same year would seem to be repetitive since most London based tour operators will meet with the states at WTM. However, I recommend the states consider doing one or two days of trainings in London primarily for sales staff either immediately before or after WTM, similar to what was done in 2008.

Respectfully submitted,

Kim Birrell
Marketing Manager
Rocky Mountain International